

Property/casualty turnkey programs

Let our Private Client Group make it simple for your firm to introduce property/casualty and custom risk management services to your high net worth clients. You don't have to be a licensed insurance advisor to bring superior wealth preservation capabilities to your most successful clients.

Program components

We can connect you to best-in-class independent insurance specialists that provide you with these turnkey services:

Broker team	Responsibilities
Program development and marketing	<ul style="list-style-type: none"> Create structure and delivery of personal insurance solutions Design "private label" or other insurance offerings
Business development and education	<ul style="list-style-type: none"> Market programs to advisors and provide education Design events/forums for advisors/clients/prospects
Broker services	<ul style="list-style-type: none"> Deliver all data gathering, risk analysis, lifestyle assessment services Handle consultations, new business and renewals Market programs to insurance markets and present analysis and program options to advisor/client Provide specialized risk management Accept E&O exposure for broker functions
Claims	<ul style="list-style-type: none"> Oversee all individual and program claims
Technology	<ul style="list-style-type: none"> Establish web presence, informational tools and enrollment
Accounting and administration	<ul style="list-style-type: none"> Audit direct bill premium remittance, commission collection, and disbursements in a transparent and efficient manner
Licensing	<ul style="list-style-type: none"> All broker licensing, reporting, and fiduciary responsibilities for personal insurance programs under state regulations
Revenue	<ul style="list-style-type: none"> Negotiable models

Private Client Group
affiliations:



If you would like more information, please contact Dawn Quinlivan, Vice President, Strategic Sales at 415 836 7333; dawn.quinlivan@chartisinsurance.com or visit www.chartisinsurance.com/pcg/advisor.

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